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Long Range Planning and its Implications for Development.

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Longrange planning is the key to continued successful development of colleges and universities. Essential elements of effective developmental planning include (1) clearly stated institutional objectives, (2) a careful inventory of resources, (3) a thorough understanding of operations, (4) a realistic timetable, (5) an unambiguous philosophy of institutional finance, (6) a sensitivity to social, economic, technological, and educational trends which condition an institution's development, and (7) a continuous program of institutional research to identify potential weakness and needed change. Longrange planning also enhances fund raising success. (TT)

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(Sharvy G. Umbeck)

LONG RANGE PLANNING AND ITS IMPLICATIONS FOR DEVELOPMENT

CERTAINLY, IT IS NOT NECESSARY TO REMIND THIS AUDIENCE THAT FOR LIBERAL ARTS COLLEGES EVERYWHERE THESE ARE DAYS OF DIFFICULT AND PROFOUNDLY IMPORTANT DECISIONS. THE HARD, COMPLEX FACTS OF THE CONTEMPORARY EDUCATIONAL SCENE PRESENT NO EASY ALTERNATIVES. THOSE COLLEGES WHOSE TRUSTEES, FACULTY AND STAFF HAVE THE VIGOR, IMAGINATION AND COURAGE TO MAKE THE TOUGH AND SOMETIMES UNPLEASANT DECISIONS THAT ARE ESSENTIAL, AND TO IMPLEMENT THESE DECISIONS EFFECTIVELY, FACE A FUTURE OF UNPRECEDENTED OPPORTUNITY. ON THE OTHER HAND, THOSE COLLEGES WHICH, FOR ONE REASON OR ANOTHER, FAIL TO FACE UP TO THESE DECISIONS ARE ENTERING A FUTURE IN WHICH DECLINING INSTITUTIONAL SIGNIFICANCE AND EFFECTIVENESS IS ASSURED.

IT IS PARADOXICAL THAT THIS MOMENTOUS PERIOD OF DECISION SHOULD OCCUR AT THAT VERY TIME IN OUR HISTORY WHEN MOST COLLEGES HAVE MORE STUDENTS AND BETTER STUDENTS THAN EVER BEFORE, WHEN WE HAVE MORE FACULTY AND BETTER FACULTY, MORE BUILDINGS AND BETTER BUILDINGS, WHEN SALARIES ARE SIGNIFICANTLY HIGHER, WHEN FINANCIAL SUPPORT, MAKING FULL ALLOWANCE FOR INFLATION, IS DRAMATICALLY IMPROVED, WHEN PUBLIC CONCERN FOR HIGHER EDUCATION IS AT AN ALL-TIME HIGH - AT SUCH A MOMENT, THE DAY OF JUDGMENT IS UPON US.

A BROAD SPECTRUM OF INSTITUTIONAL ADJUSTMENTS WILL APPEAR IN THE RESPONSES WHICH COLLEGES MAKE TO THE COMPELLING SOCIAL FORCES AND FACTORS OF CONTEMPORARY SOCIETY. SOME COLLEGES WILL CONTINUE TO GROW IN STATURE AND IN STRENGTH

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AND IN SERVICE TO THEIR OBJECTIVES. SOME PRIVATE COLLEGES WILL BECOME TAX-SUPPORTED INSTITUTIONS. SOME COLLEGES WILL MAKE RADICAL SHIFTS IN THEIR CENTRAL PURPOSES AND OBJECTIVES, AND THEREBY CHANGE THEIR BASIC CHARACTER. SOME WILL MERGE WITH OTHER COLLEGES. SOME, PERHAPS MANY, WILL CONTINUE TO OPERATE AS WEAK, RELATIVELY INEFFECTIVE INSTITUTIONS. AND STILL OTHERS WILL DIE. IN MOST CASES, THE DIFFERENCE WILL BE A RESULT OF THE VIGOR, THE IMAGINATION, THE CREATIVITY AND THE EFFECTIVENESS OF COLLEGE MANAGEMENT.

BY THIS TIME, AUGUST 1968, IT SHOULD BE APPARENT TO EVERYONE THAT THE DAY OF THE LEISURELY MOVING, RELATIVELY UNCHANGING COLLEGE OF THE "OLD SIWASH" PROTOTYPE IS RAPIDLY DISAPPEARING. IN A PERIOD OF HISTORY THAT IS UNRIVALLED WITH REFERENCE TO THE RAPIDITY WITH WHICH NEW PRECEDENTS ARE BEING ESTABLISHED, THE MODERN COLLEGE MUST BE NIMBLE, ADAPTABLE, VIGOROUS, SENSITIVE TO NEW AND CHANGING EDUCATIONAL DEMANDS. STIMULATED BY THE INCREDIBLE SPEED OF TECHNOLOGICAL DEVELOPMENT, THE PACE OF SOCIAL CHANGE BECOMES MORE AND MORE RAPID. NO LONGER CAN INSTITUTIONAL STABILITY BE PROJECTED IN FIRM, SOLID, FIXED, "ROCK OF GIBRALTAR" TERMS. TODAY WE MUST THINK, RATHER, IN TERMS OF THE STABILITY OF A MAN RIDING A BICYCLE. HE IS ASSAILED CONSTANTLY BY FORCES WHICH PULL HIM TO THE LEFT OR TO THE RIGHT. HE MAINTAINS HIS EQUILIBRIUM, HIS STABILITY, IF YOU PLEASE, ONLY BY MOVING AHEAD - BY MOVING AHEAD FASTER AND FASTER.

SIMILARLY, COLLEGES CAN MAINTAIN THEIR STABILITY AND EFFECTIVENESS ONLY BY MOVING AHEAD FASTER AND FASTER. THIS BUSINESS OF MOVING AHEAD INVOLVES INTERNAL VIGOR, A SENSE OF DIRECTION, REALISTIC ASSESSMENT OF COMPLICATING FORCES AND FACTORS. IN OTHER WORDS, MOVING AHEAD INCREASINGLY DEMANDS GOOD COLLEGE MANAGEMENT.

WITH THE MEN AND WOMEN IN THIS AUDIENCE, I DO NOT HAVE TO BUILD A CASE FOR THE GROWING IMPORTANCE OF GOOD MANAGEMENT. FRESH IN OUR MEMORIES ARE ASTOUNDING CORPORATE TRAGEDIES TRANSPIRING IN PERIODS OF ECONOMIC PROSPERITY AND GROWTH - COLLIERS MAGAZINE, CAPITAL AIRLINES, PACKARD AUTOMOBILES, ETC. FROM A LAYMAN'S POINT OF VIEW, THE PRODUCT APPEARED TO BE GOOD, THE MARKET WAS EXPANDING, THE FAILURE SEEMS TO HAVE BEEN IN MANAGEMENT.

A FEW YEARS AGO, AN EXPERIENCED, COMPETENT, RESPECTED, KNOWLEDGEABLE OBSERVER OF THE AMERICAN EDUCATIONAL SCENE TOLD ME THAT HE IS INCREASINGLY DISMAYED BY THE INADEQUATE MANAGEMENT PRACTICES OF MANY OF OUR INSTITUTIONS. ESPECIALLY DISCOURAGING, HE POINTED OUT, IS THE FACT THAT, IN MOST CASES, THERE IS NO AWARENESS OF THE INADEQUACY - NO SENSITIVITY TO THE WEAKNESS - "THEY KNOW NOT THAT THEY KNOW NOT." FORTUNATELY, IN MORE RECENT DAYS, AMONG AMERICAN COLLEGES AND UNIVERSITIES THERE HAS BECOME APPARENT ABUNDANT EVIDENCE OF GROWING RECOGNITION OF THE NEED FOR GOOD MANAGEMENT PRACTICES.

TO KEEP THE RECORD CLEAR, I SHOULD LIKE TO POINT OUT THAT WHEN I OPEN UP THIS QUESTION OF MANAGEMENT, I DO NOT WANT TO BE IDENTIFIED WITH THAT CULT OF EFFICIENCY WHICH COULD EASILY EXTERMINATE THAT WHICH IT EFFICIENTLY MANAGES. I AM REMINDED OF THE REPORT OF AN ANONYMOUS WORK STUDY ENGINEER WHO, AFTER A VISIT TO A SYMPHONY CONCERT AT THE ROYAL FESTIVAL HALL IN LONDON, REPORTED AS FOLLOWS, AND I QUOTE: "FOR CONSIDERABLE PERIODS THE FOUR OBOE PLAYERS HAD NOTHING TO DO; THEIR NUMBER SHOULD BE REDUCED AND THE WORK SPREAD MORE EVENLY OVER THE WHOLE OF THE CONCERT, THUS ELIMINATING PEAKS OF ACTIVITY. ALL TWENTY-FOUR VIOLINS WERE PLAYING

IDENTICAL NOTES: THIS SEEMS UNNECESSARY DUPLICATION. THE STAFF OF THIS SECTION SHOULD BE DRASTICALLY CUT. IF A LARGER VOLUME OF SOUND IS REQUIRED, IT COULD BE OBTAINED BY ELECTRONIC APPARATUS. MUCH EFFORT, TOO MUCH EFFORT, WAS OBSERVED IN THE PLAYING OF DEMI-SEMI-QUAVERS; THIS WOULD SEEM TO BE AN UNNECESSARY REFINEMENT. IT IS RECOMMENDED THAT ALL NOTES SHOULD BE ROUNDED UP TO THE NEAREST SEMI-QUAVER. IF THIS WERE DONE, IT WOULD BE POSSIBLE TO USE TRAINEES AND INTERNS AND LOWER-GRADE OPERATIVES MORE EXTENSIVELY. FURTHER, THERE SEEMS TO BE TOO MUCH REPETITION OF SOME MUSICAL PASSAGES. SCORES SHOULD BE DRASTICALLY PRUNED; NO USEFUL PURPOSE IS SERVED BY REPEATING ON THE HORNS A PASSAGE WHICH HAS ALREADY BEEN WELL HANDLED BY THE STRINGS. IT IS ESTIMATED THAT IF ALL REDUNDANT PASSAGES WERE ELIMINATED, THE WHOLE CONCERT TIME OF TWO HOURS AND TWENTY-THREE MINUTES COULD BE REDUCED TO TWENTY-TWO MINUTES, AND THERE WOULD BE NO NEED FOR AN INTERMISSION." THEN THERE WAS THIS ADDENDUM: "THE CONDUCTOR, IT SHOULD BE OBSERVED, GENERALLY AGREES WITH THESE RECOMMENDATIONS, BUT HE DID EXPRESS THE OPINION THAT THERE MIGHT BE SOME FALLING OFF IN BOX OFFICE RECEIPTS. IN THAT UNLIKELY EVENT, IT WOULD BE POSSIBLE TO CLOSE SECTIONS OF THE AUDITORIUM, WITH A CONSEQUENTIAL SAVING OF OVERHEAD EXPENSES, LIGHTING, ATTENDANTS, USHERS, ETC. IF THE WORST CAME TO WORST, THE WHOLE THING COULD BE ABANDONED AND THE PUBLIC COULD GO TO THE ALBERT HALL INSTEAD."

THIS STORY HAS CURIOUSLY FAMILIAR OVERTONES WHEN WE PONDER ITS APPLICATION TO MANAGEMENT AND OPERATING EFFICIENCY IN HIGHER EDUCATION.

TO ME, MANAGING MEANS TAKING ACTION TO MAKE DESIRED RESULTS COME TO PASS - TAKING ACTION TO MAKE DESIRED RESULTS COME TO PASS. MANAGEMENT HAS AS ITS CENTRAL

OBJECTIVE, MAKING THINGS HAPPEN. THROUGH SOUND MANAGEMENT PROCEDURES COLLEGES TAKE THEIR DESTINIES INTO THEIR OWN HANDS. WITHIN LIMITS, THEY CAN MAKE OF THEMSELVES WHAT THEY WANT TO BECOME.

THE BASIC COMPONENT FUNCTIONS OF MANAGEMENT MIGHT BE IDENTIFIED AS PLANNING, ORGANIZING AND DIRECTING - PLANNING, ORGANIZING AND DIRECTING. WITHIN THE MANY FACETS OF THESE OPERATIONS, THE PRESIDENT OF THE COLLEGE MUST CLEARLY DELINEATE HIS OWN ROLE, AND THEN MUST PROCEED TO DELEGATE ALL OTHER RESPONSIBILITIES.

WHEN I ACCEPTED THE PRESIDENCY AT KNOX COLLEGE, I DETERMINED THAT I PERSONALLY WOULD FOCUS MY TIME AND ENERGIES ON THREE CENTRAL TASKS: (1) I PERSONALLY WOULD ASSUME RESPONSIBILITY FOR RECRUITING AND COORDINATING THE WORK OF THE DECISION-MAKING ORGANIZATION OF THE COLLEGE. THIS INCLUDES TRUSTEES AS WELL AS THE MEN, BOTH STAFF AND LINE OFFICERS, WHO REPORT TO THE PRESIDENT, (2) I PERSONALLY WOULD ASSUME FULL RESPONSIBILITY FOR THE DIRECTION OF THE OVERALL PLANNING ACTIVITIES OF THE COLLEGE. OF COURSE, I NEED AND RECEIVE MUCH HELP FROM MANY PEOPLE, BUT CENTRAL RESPONSIBILITY FOR ACCOMPLISHING THIS TASK I DO NOT DELEGATE, (3) I PERSONALLY WOULD SEE TO IT THAT I KEPT MYSELF FULLY INFORMED REGARDING WHAT WAS HAPPENING ALONG THE FRONTIERS OF THE MAINSTREAM OF AMERICAN HIGHER EDUCATION. THIS TASK CANNOT BE ACCOMPLISHED BY SITTING IN THE OFFICE AND READING CURRENT LITERATURE. IT CALLS FOR PERSONAL PRESENCE ON THE SCENE OF ACTION. ALL OTHER RESPONSIBILITIES OF THE OFFICE OF THE PRESIDENT I DELEGATE TO MY VERY ABLE STAFF COLLEAGUES. AS A MEMBER OF THE MANAGEMENT TEAM, I SHARE IN THE FORMULATION OF INSTITUTIONAL POLICIES. IN MY WORK AS AN ADMINISTRATIVE OFFICER, I GIVE TOP PRIORITY TO THE THREE TASKS OUTLINED ABOVE.

NOW, A FEW WORDS ABOUT PLANNING - WHAT IS IT? WHAT IS INVOLVED? WHAT DOES IT DO? HOW DOES IT WORK? ALWAYS REMEMBER, PLEASE, I AM SPEAKING WITH REFERENCE TO INSTITUTIONS OF HIGHER EDUCATION. FURTHER, BECAUSE IT PROVES A CONVENIENT UNIT WITH WHICH TO WORK, I WOULD SUGGEST THAT WE THINK IN TERMS OF A PLAN FOR TEN YEARS. ANY OTHER REASONABLE PERIOD OF TIME WOULD DO JUST AS WELL, BUT FOR THESE SESSIONS WE'LL THINK IN TERMS OF A TEN-YEAR PLAN.

THE FIRST STEP IN PLANNING MIGHT BEST BE DESCRIBED AS MODEL BUILDING - MODEL BUILDING. YOU BUILD A MODEL OF YOUR COLLEGE AS YOU WOULD LIKE IT TO BE TEN YEARS FROM NOW. IF YOU COULD HAVE YOUR "DRUTHERS" - IF YOU COULD DO JUST WHAT YOU WANT TO DO - WHAT KIND OF A COLLEGE WOULD YOUR INSTITUTION BE IN 1978? PRECISELY, WHAT KIND OF A COLLEGE WOULD IT BE? REMEMBER, NOW, YOU HAVE TO BUILD THIS MODEL FROM THE GROUND UP. IT MUST BE COMPLETE. IT MUST INCLUDE ALL THE COMPONENTS. YOU CANNOT PLAN ONE FACET WITHOUT REFERENCE TO OTHER FACETS OF THE INSTITUTION. YOU CANNOT PUT FOUR WALLS ON THREE FOUNDATIONS.

THERE IS NO PLACE FOR VAGUE GENERALITIES. YOU MUST BE VERY SPECIFIC. TAKE THE MATTER OF STUDENTS, FOR EXAMPLE. HOW MANY STUDENTS WOULD YOU HAVE TEN YEARS FROM NOW? HOW MANY MEN - HOW MANY WOMEN? FROM WHAT GEOGRAPHICAL AREAS WOULD YOUR STUDENTS COME? FROM WHAT SOCIO-ECONOMIC GROUPS? WHAT WOULD BE THE CHARACTER AND THE QUALITY OF THEIR PREPARATION? WHAT WOULD BE THEIR COLLEGE BOARD SCORES? WHAT SPECIAL ABILITIES WOULD THEY HAVE? HOW WOULD YOUR STUDENTS BE DISTRIBUTED THROUGH THE FRESHMAN, SOPHOMORE, JUNIOR AND SENIOR CLASSES? HOW WOULD THEY DISTRIBUTE THEMSELVES THROUGH THE MAJOR FIELDS OF STUDY? HOW MANY WOULD LIVE ON

CAMPUS? WHAT KIND OF LIVING ACCOMMODATIONS SHOULD THEY HAVE? HOW MANY WOULD EAT IN THE CAMPUS DINING HALLS? WHAT TYPE OF FEEDING ARRANGEMENTS WOULD YOU PROVIDE?

LET'S LOOK AT YOUR FACULTY. HOW MANY TEACHERS WOULD YOU HAVE? WHAT WOULD THEY TEACH? HOW WOULD THEY TEACH? WHAT TRAINING AND EXPERIENCE WOULD THEY HAVE? WHAT WOULD BE THEIR AGE DISTRIBUTION? HOW MUCH WOULD YOU PAY THEM? WHAT FRINGE BENEFITS WOULD THEY HAVE? HOW MANY WOULD HAVE TENURE? WHAT WOULD BE YOUR SABBATICAL LEAVE POLICY? ON WHAT BASIS WOULD YOU MAKE FUNDS AND TIME AVAILABLE FOR RESEARCH? WHAT KIND, AND HOW MUCH CLERICAL HELP WOULD YOU MAKE AVAILABLE FOR THE FACULTY?

WHAT PHYSICAL FACILITIES WOULD YOU PROVIDE? HOW INTENSIVELY WOULD YOU USE YOUR PLANT? WHAT LEVELS OF MAINTENANCE WOULD YOU PROVIDE? AND SO ON - AND SO ON.

EACH AND EVERY FACET OF YOUR PROGRAM MUST BE PROJECTED WITH METICULOUS CARE: BOARD OF TRUSTEES, ADMINISTRATION, STUDENT SERVICES, CURRICULUM, CALENDAR, PLANT, FINANCE, DEVELOPMENT. WHEN YOU HAVE COMPLETED THE TASK OF BUILDING YOUR MODEL - WHEN ALL THE PARTS ARE FULLY COORDINATED - YOU WILL FIND THAT YOU HAVE ESTABLISHED A CLEAR SET OF OBJECTIVES TOWARD WHICH YOU HOPE TO MOVE IN THE FORTHCOMING DECADE.

STEP TWO IN PLANNING INVOLVES THE DEVELOPMENT OF A PROGRAM BY WHICH YOU

WILL MOVE FROM WHERE YOU ARE TO WHERE YOU WANT TO GO. THIS PROGRAM INCLUDES ALL THE PROCESSES AND PROCEDURES WHICH YOU MUST INSTITUTE TO ATTAIN YOUR OBJECTIVES. IT PRESUPPOSES, OF COURSE, THE UTILIZATION OF FEASIBILITY STUDIES WHICH ASSESS YOUR CAPACITY FOR MOVING FROM WHERE YOU ARE TO WHERE YOU WANT TO GO IN TEN YEARS. YOU MAY FIND THAT YOU SIMPLY CAN'T DO THE JOB WITHIN THAT PERIOD OF TIME. IT IS ENTIRELY POSSIBLE THAT YOU MAY HAVE TO EFFECT MODIFICATIONS IN YOUR LONG RANGE AS WELL AS INTERMEDIATE GOALS.

AT THIS POINT, IT MIGHT BE APPROPRIATE TO INDICATE A FEW OF THE INGREDIENTS WHICH ARE ESSENTIAL TO EFFECTIVE PLANNING. PLEASE REMEMBER, I AM MAKING NO PRETENSE OF ATTEMPTING TO DISCUSS ALL THE INGREDIENTS ESSENTIAL TO GOOD PLANNING. I SHALL INDICATE ONLY A FEW OF THE MORE IMPORTANT:

(1) PLANNING INVOLVES THE PRESENCE OF CLEARLY STATED INSTITUTIONAL OBJECTIVES. IT IS NOT UNREASONABLE FOR ME TO ASSUME THAT AT EVERY CONFERENCE YOU HAVE ATTENDED YOU HAVE HEARD STRESS PLACED ON THE IMPORTANCE OF ADOPTING CLEARLY STATED AND COMMONLY UNDERSTOOD INSTITUTIONAL PURPOSES. UNFORTUNATELY, MANY COLLEGES AND UNIVERSITIES HAVE LOST SIGHT OF THEIR ORIGINAL OBJECTIVES AND HAVE NOT ESTABLISHED NEW VITAL PURPOSES FOR THEMSELVES. FURTHER, SOME COLLEGES ARE TRYING TO SERVE PURPOSES THAT ARE OUT OF DATE. INSTITUTIONAL OBJECTIVES MUST BE CLEAR, UP TO DATE, SOCIALLY IMPORTANT AND ASSIDUOUSLY PURSUED. IT IS AT THIS POINT OF BASIC PURPOSES AND OBJECTIVES THAT THERE APPEARS THE MOST SIGNIFICANT DISTINCTION BETWEEN TAX-SUPPORTED AND INDEPENDENT COLLEGES. THE TAX-SUPPORTED INSTITUTION HAS A MISSION DISTINCTLY DIFFERENT FROM THAT OF THE INDEPENDENT INSTITUTION. NON-PUBLIC COLLEGES AND UNIVERSITIES WILL PLAY A VITAL ROLE ON THE AMERICAN SCENE ONLY AS LONG

AS THEY SERVE IMPORTANT AND APPARENT SOCIAL NEEDS, NOT SO EFFECTIVELY SERVED BY PUBLIC INSTITUTIONS. IN THE LANGUAGE OF THE ECONOMISTS, "PRODUCT DIFFERENTIATION" IS THE KEY TO THE FUTURE OF INDEPENDENT HIGHER EDUCATION. COLLEGES WHICH MAINTAIN FOCUS ON CLEARLY-DEFINED, SOCIALLY SIGNIFICANT OBJECTIVES AND WHICH EFFECTIVELY SERVE THOSE OBJECTIVES WILL CONTINUE TO BE SUCCESSFUL INSTITUTIONS REGARDLESS OF SOURCE OF SUPPORT. INSTITUTIONS WITH VAGUELY DEFINED OBJECTIVES, OR WITH OBJECTIVES NO LONGER IMPORTANT TO SOCIETY, WILL FADE AWAY. THE SAME FATE AWAITS INSTITUTIONS WHICH INEFFECTIVELY SERVE THEIR OBJECTIVES REGARDLESS OF THEIR IMPORTANCE.

PLEASE LET ME REMIND YOU THAT IT IS ALTOGETHER TOO EASY TO PULL THE WOOL OVER OUR OWN EYES - TO KID OURSELVES ABOUT WHAT WE ARE REALLY DOING. THE MOST ELOQUENT LIP SERVICE TO NOBLE PURPOSES IS NOT ENOUGH. THE TIME IS AT HAND WHEN WE MUST "DELIVER THE GOODS" - WE MUST DO WHAT WE SAY WE DO. WE MUST ACCOMPLISH OUR EDUCATIONAL OBJECTIVES IN A FASHION THAT IS CLEAR, OBVIOUS AND DEMONSTRABLE.

(2) A SECOND INGREDIENT IN PLANNING INVOLVES CAREFUL INVENTORY OF RESOURCES. THROUGH THIS PROCEDURE YOU METICULOUSLY DEFINE YOUR POINT OF DEPARTURE. YOU DETERMINE JUST WHERE YOU ARE. PARENTHETICALLY, YOU PROBABLY HAVE OBSERVED THAT YOUR WORK IN STEP ONE - MODEL BUILDING - IS SIMILAR IN MANY WAYS TO THE WORK OF SOME OF OUR GREAT SOCIAL VISIONARIES, THE CREATORS OF UTOPIAS. THESE FELLOWS, HOWEVER, NEVER SUCCEEDED IN DEVELOPING A LONG RANGE PLAN FOR GETTING FROM WHERE THEY WERE TO WHERE THEY WANTED TO GO. THEY NEVER DISCOVERED A PROCEDURE BY WHICH THEY COULD LEAD THEIR OWN SOCIAL GROUP INTO A UTOPIAN WAY OF LIFE. AS A RESULT, MOST OF THEM ADOPTED THE SIMPLE EXPEDIENT OF STARTING SOMEWHERE ELSE - AT SOME FAR OFF

PLACE, LIKE A REMOTE ISLAND OR ANOTHER PLANET.

NOW YOU AND I CAN'T DO THIS WHEN WE UNDERTAKE INSTITUTIONAL PLANNING. IF OUR COLLEGE STANDS ON THE COLD WINDY PRAIRIE OF THE MIDWEST, WE CAN'T PRETEND THAT IT IS ON THE WARM, DRY SANDS OF THE SOUTHWEST. IF OUR ENDOWMENT STANDS AT ONE MILLION, WE CAN'T START WITH TEN OR TWENTY MILLION. IF OUR PLANT IS INADEQUATE, AND BADLY DETERIORATED, WE CAN'T PRETEND THAT WE HAVE NO BUILDING PROBLEMS. WE MUST START PRECISELY WHERE WE ARE WITH ALL THE LIABILITIES AS WELL AS THE ASSETS THAT ARE OUR HERITAGE OF THE MOMENT.

OF COURSE, YOUR INVENTORY MUST INCLUDE MUCH MORE THAN ASSETS OF PLANT, LAND, EQUITIES, CASH, EQUIPMENT, ETC. YOU MUST GO ON FROM THERE. WHAT ARE THE STRENGTHS OF YOUR BOARD OF TRUSTEES? WHAT ARE THE WEAKNESSES? WHAT CAN YOU DO ABOUT THE WEAKNESSES? WHAT DO YOU PLAN TO DO ABOUT THEM - HOW SOON? WHAT ARE THE ASSETS AND THE LIABILITIES OF YOUR ADMINISTRATIVE TEAM? OF YOUR FACULTY? WHAT CAN YOU DO ABOUT THEM? HOW? HOW SOON? WHAT IS THE CHARACTER OF YOUR STUDENT MARKET? WHAT WOULD A TUITION INCREASE OF $200, $500 OR $1,000 DO TO YOUR STUDENT MARKET? WHAT IS YOUR FUND-RAISING POTENTIAL? WHAT ARE YOUR MOST PROMISING FUND-RAISING PUBLICS?

OBVIOUSLY, THE INTANGIBLE RESOURCES - PERSONNEL, STUDENT MARKETS, ETC. ARE MUCH MORE DIFFICULT TO ASSESS THAN ASSETS OF PLANT, LAND, EQUIPMENT. REALISTIC APPRAISAL OF INSTITUTIONAL POTENTIAL CALLS FOR HARD-HEADED, SOUL-SEARCHING EXAMINATION OF THESE INTANGIBLES AS WELL AS OF THE TANGIBLES. WISHFUL THINKING AT THIS POINT CAN LEAD ONLY TO DISASTER.

(3) EFFECTIVE PLANNING ALSO INVOLVES THOROUGH UNDERSTANDING OF OPERATIONS. I AM SURE THAT ALL OF YOU THINK YOU UNDERSTAND THE OPERATIONS OF YOUR RESPECTIVE COLLEGES. BUT DO YOU REALLY? HAVE YOU MADE MAXIMUM USE OF THE TOOLS OF OPERATIONS ANALYSIS? WHAT DO YOU KNOW ABOUT YOUR PRODUCTION COSTS? HAVE YOU ANALYZED YOUR PRODUCTION COSTS AS METICULOUSLY AS INDUSTRY ANALYZES ITS COSTS? HOW MUCH DOES IT COST TO PLACE A BOOK ON THE SHELF IN YOUR LIBRARY? HOW MUCH DOES IT COST ANNUALLY TO KEEP THAT BOOK WARM, DRY, CLEAN, ILLUMINATED AND AVAILABLE? HOW FREQUENTLY IS THAT BOOK USED? WHO MADE THE DECISION TO BUY THAT PARTICULAR BOOK IN THE FIRST PLACE? ON WHAT BASIS WAS THE DECISION MADE? UNDER WHAT CIRCUMSTANCES DOES IT BECOME MORE EFFICIENT TO BORROW IT THAN TO BUY IT? DOES YOUR COST ANALYSIS INCLUDE SUCH ITEMS AS DEPRECIATION ON THE EDUCATIONAL PLANT?

HOW MUCH DOES IT COST YOU PER STUDENT TO RECRUIT - PROCESS - ADMIT A FRESHMAN TO YOUR COLLEGE? WHAT IS THE ULTIMATE FOUR YEAR COST OF ONE DOLLAR SCHOLARSHIP AID GRANTED TO AN ENTERING STUDENT? WHAT ARE THE COMPARATIVE PER UNIT COSTS OF TEACHING FRESHMEN, SOPHOMORES, JUNIORS AND SENIORS? TO WHAT EXTENT ARE UPPERCLASS COSTS INFLUENCED BY ATTRITION? WOULD THERE BE FISCAL ADVANTAGES IN LOWERING THE RATIO OF UPPERCLASSMEN TO LOWERCLASSMEN? WHAT DOES IT COST YOU TO GRADUATE A MUSIC MAJOR, OR A CHEMISTRY MAJOR? HOW MUCH DOES IT COST YOU TO TEACH SPORTSMANSHIP, FAIR PLAY AND OTHER IDEALS TO A VARSITY FOOTBALL PLAYER?

JUST WHAT DOES YOUR GIFT PROCUREMENT PROGRAM COST? DO YOU REALLY KNOW THE HIDDEN COSTS INVOLVED IN GIFT PROCUREMENT? JUST HOW MUCH DO YOU SPEND TO RAISE A DOLLAR? IN TERMS OF DOLLARS, HOW LARGE A CONTRACT ARE YOU REALLY SIGNING WHEN YOU GRANT TENURE TO A MEMBER OF YOUR FACULTY? (I WOULD LIKE TO POINT OUT THAT WHEN WE SOUGHT THE ANSWER TO THIS QUESTION AT KNOX WE FOUND THAT GRANTING OF TENURE

CURRENTLY INVOLVES AN INSTITUTIONAL COMMITMENT OF MORE THAN ONE-HALF MILLION DOLLARS. CANDIDLY, I MUST ASK MYSELF WHETHER WE TREAT THIS DECISION AS THOUGH IT WERE A ONE-HALF MILLION DOLLAR DECISION.)

UNTIL YOU HAVE SUBJECTED THE PROCESSES AND PROCEDURES OF YOUR INSTITUTION TO THE SEARCHING SCRUTINY OF OPERATIONS ANALYSIS YOU CAN NEVER FULLY UNDERSTAND THE FISCAL INTERRELATIONSHIPS THAT UNDERGIRD YOUR PROGRAM.

(4) ANOTHER ESSENTIAL INGREDIENT IN PLANNING IS THE TIMETABLE. THE SCHEDULE WHICH TIMES YOUR MOVES FROM WHERE YOU ARE TO WHERE YOU WANT TO GO MUST BE DEVELOPED IN TERMS OF OBJECTIVE STUDY OF RESOURCES AND FULL ANALYSIS OF POTENTIAL. IT IS ESSENTIAL TO KNOW WHETHER YOU ARE RIDING WITH NATIONAL AND LOCAL TRENDS OR FIGHTING AN UPHILL BATTLE AGAINST CURRENTS FLOWING IN THE OPPOSITE DIRECTION. ESTABLISHING A TIMETABLE INVOLVES CAREFUL COORDINATION OF ALL PHASES OF THE PROGRAM. FUND-RAISING MUST BE GEARED TO PRODUCE MONEY FOR PLANT AT THE TIME THE BUILDINGS ARE NEEDED. ADMISSIONS MUST BE GEARED TO PRODUCE STUDENTS IN NUMBER AND QUALITY CALLED FOR. DORMITORIES AND DINING HALLS MUST BE READY FOR STUDENTS WHEN THEY ARRIVE. OBVIOUSLY, ALL THE MOVES MUST BE TIMED IN TERMS OF REALISTIC APPRAISAL OF INSTITUTIONAL POTENTIAL. MOST IMPORTANT OF ALL, DEVELOPMENT OF A TIMETABLE COMPELS YOU TO ESTABLISH INSTITUTIONAL PRIORITIES AND OPERATING PROCEDURES WHICH ASSURE "DOING FIRST THINGS FIRST."

(5) A FIFTH INGREDIENT OF EFFECTIVE PLANNING IS TO BE FOUND IN A CLEAR-CUT PHILOSOPHY OF INSTITUTIONAL FINANCE. OBVIOUSLY, ANY GIVEN PHILOSOPHY MAY BE FINE

FOR ONE INSTITUTION AND COMPLETELY INAPPROPRIATE FOR ANOTHER. YOU MUST CLEARLY IDENTIFY THE ROLE WHICH VARIOUS INCOME SOURCES WILL PLAY IN YOUR FISCAL STRUCTURE. ONLY AFTER YOU HAVE DECIDED ON THE FUNCTIONS OF STUDENT FEES, ENDOWMENT INCOME, GIFTS, ETC. CAN YOU EFFECTIVELY PLAN FOR THE FINANCING OF YOUR PROGRAM. SIMPLY STATED, THE BASIC QUESTION IS: "WHO PAYS FOR WHAT?" MORE PARTICULARLY, WHAT SPECIFIC AREAS OF YOUR OPERATION ARE PAID FOR BY THE STUDENT? WHAT SPECIFIC AREAS ARE SUBSIDIZED? WHAT IS TO BE THE AMOUNT OF THE SUBSIDY? WHAT IS TO BE THE SOURCE OF THE SUBSIDY? THESE FOUR QUESTIONS APPEAR TO BE VERY SIMPLE, BUT IF YOU CONSCIENTIOUSLY SEEK THE ANSWERS YOU WILL FIND YOURSELF INVOLVED IN A TRULY SOUL-SEARCHING EXPERIENCE. FREQUENTLY YOUR HEART WILL CLASH WITH YOUR HEAD. THE FACTORS WHICH MUST ENTER INTO YOUR DELIBERATION ARE NUMEROUS, HIGHLY COMPLEX AND FREQUENTLY INTANGIBLE. UNFORTUNATELY, MANY INSTITUTIONS SIMPLY REFUSE TO ANSWER THE QUESTIONS - THEY SIMPLY PRETEND THE QUESTIONS ARE NOT THERE. THESE INSTITUTIONS ARE USUALLY IN FINANCIAL DIFFICULTIES. VIABLE LONG RANGE PLANNING CANNOT TAKE PLACE UNTIL THESE SIMPLE QUESTIONS REGARDING PHILOSOPHY OF FINANCE ARE FORTHRIGHTLY AND REALISTICALLY ANSWERED.

(6) ESSENTIAL TO ALL LONG RANGE PLANNING IS KEEN SENSITIVITY TO THE POTENT SOCIAL, ECONOMIC, TECHNOLOGICAL AND EDUCATIONAL TRENDS WHICH CONDITION THE DEVELOPMENT OF OUR RESPECTIVE INSTITUTIONS. OBVIOUSLY, INSTITUTIONAL PLANNING CANNOT TAKE PLACE IN A VACUUM. THE FULL WEIGHT OF THE IMPACT OF CURRENT TRENDS MUST BE FED INTO THE DECISION-MAKING PROCESS WHICH UNDERGIRDS THE IMPLEMENTATION OF ANY LONG TERM GOALS. FOR EXAMPLE, ON THE CURRENT SCENE, INTELLIGENT PLANNING MUST TAKE COGNIZANCE OF SUCH TRENDS AS THE CHANGING PATTERNS IN COLLEGE SELECTION

ON THE PART OF HIGH SCHOOL GRADUATES - CHANGES IN SELECTIVE SERVICE - AND THE CONCOMITANT IMPACT ON THE FUTURE SUPPLY OF PH.D'S. - THE DEVELOPMENT OF PORTABLE STUDENT AID VS. INSTITUTIONAL CONTROLLED STUDENT AID - THE CHANGING PRICING POLICIES OF STATE AS WELL AS PRIVATE INSTITUTIONS - THE RAPIDLY GROWING EROSION OF THE FREE-STANDING LIBERAL ARTS COLLEGE AS A SELF-SUFFICIENT UNIT, AND THE SIMULTANEOUS GROWTH OF COOPERATIVE VENTURES, ETC., ETC.

BY THIS TIME IT SHOULD BE CLEAR THAT A CONTINUOUS, IMAGINATIVE, VIGOROUS PROGRAM OF INSTITUTIONAL RESEARCH IS INDISPENSABLE FOR THE DEVELOPMENT AND IMPLEMENTATION OF A VIABLE PLAN. THE ADMONITION OF SOCRATES: "KNOW THYSELF" IS THOROUGHLY APPLICABLE TO THIS TASK. THE PRODUCTS AND PROCESSES OF HIGHER EDUCATION MUST BE SUBJECTED TO RIGOROUS SCRUTINY. ACADEMIC DECISION MAKING MUST BE BASED ON EMPERICAL DATA - NOT ON SUBJECTIVE JUDGMENTS AND HUNCHES.

THE LONG RANGE PLAN MUST NEVER BE LOOKED UPON AS A FIXED, UNCHANGEABLE BLUEPRINT. IT IS, RATHER, A THOUGHTFULLY DEVELOPED SET OF GUIDELINES TO BE USED AS A TOOL FOR CHARTING THE INSTITUTION'S COURSE. THE PLAN MUST BE UP-DATED AND REVISED REGULARLY. IT MUST BE ALTERED TO MEET NEW SOCIAL, ECONOMIC AND EDUCATIONAL CONDITIONS. IT MUST FACILITATE ORDERLY GROWTH AND INSTITUTIONAL EFFECTIVENESS - NOT IMPEDE OR CIRCUMSCRIBE IT. A GOOD PLAN PROVIDES A FRAMEWORK FOR READILY AND CLEARLY ASSESSING THE INSTITUTION-WIDE EFFECTS OF ANY MODIFICATION IN ANY FACET OF THE COLLEGE PROGRAM. YOU DON'T DEVELOP A PLAN AND THEN PUT IT ON THE SHELF. THE PLAN MUST BE KNOWN TO ALL GROUPS WITHIN THE INSTITUTION, AND UNDERSTOOD BY THEM. WHERE PLANNING WORKS BEST, IT BECOMES A WAY OF LIFE FOR THE WHOLE INSTITUTION.

IN MY OPINION, IT IS CLEAR THAT PLANNING MUST BE A TEAM OPERATION. THE CAPTAIN OF THE TEAM MUST BE THE PRESIDENT - THE PRESIDENT HIMSELF MUST LEAD AND DIRECT PLANNING OPERATIONS. THIS IS ONE FUNCTION HE CANNOT DELEGATE. FROM SOME POINTS OF VIEW, THIS MAY BE THE MOST SIGNIFICANT THING THE PRESIDENT DOES.

THE MOST DIFFICULT PHASE OF PLANNING IS FOUND IN THE BASIC DECISIONS WHICH MUST BE MADE WITH REFERENCE TO THE MODEL INSTITUTION TOWARD WHICH YOU ARE MOVING. SOME OF THESE DECISIONS MUST BE MADE BY THE BOARD OF TRUSTEES - SOME BY THE FACULTY - STILL OTHERS BY MANAGEMENT. SPECIAL CARE MUST BE EXERCISED TO SEE TO IT THAT NO GROUPS OR INDIVIDUALS MAKE DECISIONS THAT RIGHTFULLY BELONG TO ANOTHER - THAT WOULD BE FATAL. IF, FOR EXAMPLE, MANAGEMENT DECIDES THAT THE ULTIMATE STUDENT-FACULTY RATIO SHOULD BE FIFTEEN TO ONE, IF THE FACULTY DOES NOT AGREE WITH SUCH A RATIO I CAN GUARANTEE IT WON'T WORK!

IN EACH AREA OF THE INSTITUTION'S OPERATIONS THE RESPONSIBLE ADMINISTRATIVE OFFICER MUST SHARE IN ESTABLISHING BOTH THE TEMPORARY AND THE LONG RANGE GOALS. IN EACH CASE, HE MUST BE CONVINCED THAT THE GOALS ARE REASONABLE AND ATTAINABLE. HE MUST BE FULLY INFORMED REGARDING OBJECTIVES AND TIMETABLES IN ALL OTHER AREAS. HE MUST COMPREHEND CLEARLY WHAT FAILURE TO MEET HIS GOALS AND TIMETABLES WILL MEAN TO THE TOTAL PROGRAM AND TO OTHER SPECIFIC AREAS. THE DIRECTOR OF ADMISSIONS MUST FULLY UNDERSTAND THE COMPLICATIONS THAT WILL BE BROUGHT ON BY HIS FAILURE TO DELIVER THE SCHEDULED NUMBER OR THE PROJECTED QUALITY OF ENTERING STUDENTS IN ANY GIVEN YEAR. FACULTY ADDITIONS, COURSE STRUCTURES, DORMITORY CONSTRUCTION, TUITION INCOME, ETC. HAVE ALL BEEN PREDICATED ON THE ASSUMPTION THAT HE WILL DELIVER AS SCHEDULED.

THE DIRECTOR OF DEVELOPMENT MUST BE THOROUGHLY COGNIZANT OF HOW MUCH RESTS ON HIS SHOULDERS. THE FULL IMPLICATIONS OF FAILURE TO DELIVER GIFT FUNDS AS SCHEDULED MUST BE CLEARLY APPARENT TO HIM.

THE CHIEF DEVELOPMENT OFFICER MUST BE A MEMBER OF THE PLANNING TEAM - A VERY IMPORTANT MEMBER. BECAUSE OF HIS EXPERIENCE AND BUSINESS BACKGROUND, HE MAY BE MORE SENSITIVE THAN MOST OTHER MEMBERS OF THE STAFF TO THE NEED FOR A PLAN. THEREFORE, HE MAY BE VERY ACTIVE IN STIMULATING HIS COLLEAGUES TO DEVELOP A PLAN - BUT IN NO CASE, UNDER NO CONDITION, SHOULD THE DEVELOPMENT OFFICER ASSUME RESPONSIBILITY FOR DIRECTING THE BUILDING OF AN INSTITUTIONAL PLAN. (OF COURSE, THE SAME IS TRUE OF THE DEANS, THE BUSINESS OFFICER, ETC.) THAT IS THE JOB OF THE PRESIDENT, AND HE ALONE CAN DIRECT THAT IMPORTANT MANAGEMENT FUNCTION.

IN MY HUMBLE OPINION, IT IS NOT AN OVERSTATEMENT TO SAY THAT A SOUND, LONG RANGE PLAN IS AN INDISPENSABLE ELEMENT IN A SUCCESSFUL DEVELOPMENT PROGRAM. NO ONE KNOWS THIS BETTER THAN THE DEVELOPMENT OFFICERS THEMSELVES. JUST WHAT DOES PLANNING DO FOR FUND-RAISING?

(1) PLANNING PROVIDES THE DEVELOPMENT OFFICER WITH TANGIBLE STANDARDS BY WHICH HE CAN ASSESS THE EFFECTIVENESS OF HIS OPERATIONS. TO THE EXTENT THAT HE PRODUCES FUNDS IN THE AMOUNTS AND ON THE SCHEDULE ESTABLISHED BY THE PLAN, HE CAN TAKE PERSONAL SATISFACTION IN WHAT HE HAS ACCOMPLISHED. HE KNOWS PRECISELY WHAT IS EXPECTED OF HIM, AND THE EXTENT TO WHICH HE HAS "DELIVERED THE GOODS."

(2) INCREASINGLY, DONORS EXPECT THAT THE INSTITUTIONS TO WHICH THEY

CONTRIBUTE WILL BE WELL MANAGED. INSTITUTIONS WHICH DO NOT PLAN ARE BADLY MANAGED. ENOUGH SAID.

(3) FUND-RAISING EXPERTS TELL ME THAT THOUGHTFUL, DISCRIMINATING DONORS LIKE TO GIVE TO STRENGTH. THEY LIKE TO GIVE TO COLLEGES WHICH ARE LIKELY TO BE AROUND FOR A WHILE - WHICH HAVE THE CAPACITY TO DO THAT WHICH THEY SAY THEY WILL DO. IN OTHER WORDS, A DONOR LOOKS FOR ASSURANCE THAT THE COLLEGE CAN AND WILL CARRY OUT HIS INTENT. COLLEGES WHICH PLAN AND DEMONSTRATE THEIR ABILITY TO LIVE BY THEIR PLAN ~~BREATHE~~ BREED CONFIDENCE - CONFIDENCE ~~BREATHES~~ BREEDS GIFTS. WE ALL LIKE TO SUPPORT A WINNER. HERE, AS ELSEWHERE, "THEM THAT HAS GETS."

(4) GIFTS TO COLLEGES WHICH PLAN ARE NOT LOST IN THE GENERAL BUDGET. FEW DONORS ANYWHERE DERIVE PERSONAL SATISFACTION FROM CONTRIBUTIONS TO OFFSET BUDGET DEFICITS. WHEN CONTRIBUTING TO A COLLEGE WHICH HAS A REALISTIC PLAN, THE DONOR IS GIVEN A SENSE OF PERSPECTIVE. HE CAN SEE PRECISELY WHAT HIS GIFT WILL ACCOMPLISH. HE CAN IDENTIFY HIMSELF WITH SPECIFIC LONG-TERM RESULTS. THE REWARDS OF GIVING BECOME CONSPICUOUSLY APPARENT.

(5) PLANNING COMPELS MANAGEMENT TO MAINTAIN SHARP FOCUS ON OBJECTIVES. THESE OBJECTIVES MUST BE STATED IN LUCID LANGUAGE THAT THE LAYMAN CAN UNDERSTAND - AND REMEMBER, MOST DONORS ARE LAYMEN. WITH THIS AUDIENCE, I DO NOT NEED TO ENLARGE ON THIS POINT.

(6) BY DEFINING AND IDENTIFYING FINANCIAL PROBLEMS WELL IN ADVANCE, A VIGOROUS CONTINUOUS PROGRAM OF DEVELOPMENT IS MADE POSSIBLE AT COLLEGES WHICH PLAN. HIGH PRESSURE CAMPAIGNS CAN USUALLY BE AVOIDED. INSTITUTIONS WHICH CONSISTENTLY APPEAL FOR FUNDS ON THE BASIS OF FISCAL CRISIS OR IMMINENT CATASTROPHE ARE USUALLY INSTITUTIONS WHICH DO NOT PLAN.

(7) LONG RANGE PLANNING IN THE DEVELOPMENT OFFICE REQUIRES THE PROJECTION OF ANNUAL GOALS BY FUND SOURCES: BUSINESS AND INDUSTRY, ALUMNI, BEQUESTS, FOUNDATIONS, ETC. SPECIFIC WRITTEN GOALS OF THIS TYPE DEMAND THAT THE DEVELOPMENT OFFICER FREQUENTLY REVIEW HIS WORK TO SEE IF HE IS ALLOCATING FUNDS, TIME AND ENERGY IN AMOUNTS CONSISTENT WITH ANTICIPATED RETURNS. FOR EXAMPLE, IF YOU ANTICIPATE THAT 30% OF YOUR GIFTS IN THE YEARS AHEAD WILL COME FROM BEQUESTS, THE BEQUEST PROGRAM DESERVES 30% OF YOUR TIME, ENERGY AND RESOURCES. IF 10% OF YOUR GIFTS WILL COME FROM INDUSTRY AND BUSINESS, THAT PROGRAM DOESN'T MERIT 70% OR 80% OF YOUR EFFORT. HOW OFTEN DO YOU CHECK YOURSELF ON THIS POINT?

BY FOCUSING ATTENTION ON THAT IDEAL, MODEL INSTITUTION WHICH LIES AHEAD, THE COLLEGE WHICH PLANS ADOPTS A POSITIVE APPROACH. WHAT IT DOES NOW TAKES ON ADDITIONAL MEANING BECAUSE IT RELATES TO WHAT LIES AHEAD. WE ALL LIKE TO BE IDENTIFIED WITH PROGRAMS THAT LEAD TO A BETTER WORLD. WE ALL LIKE TO BE CONSIDERED THOUGHTFUL, UNDERSTANDING, FAR-SIGHTED, IMAGINATIVE. DONORS ARE NO EXCEPTION. THROUGH YOUR PLANS YOU CAN HARNESS TO YOUR ENDS THAT MOST BASIC AND MOST POTENT OF ALL PHILANTHROPIC MOTIVATION - THE DESIRE TO IDENTIFY OURSELVES WITH PROGRAMS OF HIGH ASPIRATION AND NOBLE PURPOSE.